OFFICER EVALUATION REPORTING SYSTEM (OERS)

Agenda

- Purpose
- DA Form 67-9 OER System
  - Components and Goals
  - Counseling and Support Forms
  - Masking
  - OER Enhancements Effective 1 Oct 2004
  - OER Form Completion
  - OER Trends

Purpose

To provide an update on the Army's Officer Evaluation Reporting System

<u>References</u>

AR 623-105

DA PAM 623-105

Milper Msg 04-236

67-9 OER
KEY COMPONENTS OF THE SYSTEM

- SUPPORT FORM
- DEVELOPMENTAL SUPPORT FORM (DSF)
- DA FORM 67-9 OER EVALUATION
- SENIOR RATER PORTION OF DA FORM 67-9

DA Form 67-9 OER Goals

- **Provide selection boards and personnel managers adequate information to make their decisions.**

- **Allow for field impact on selection of future leaders.**
  - **Opportunity to advance the "Best"**
  - **Establish Senior Rater Accountability**
  - **Confidence that others cannot inflate**
  - **Narratives focus on Quantitative Performance & Potential**

- **Enhance Leader Development**
  - **Focus on Officer Development at Company Grade Level**
  - **Basis in Army Values, Doctrine & Leadership**
  - **Emphasis on Counseling**
  - **Link with OPMS III**

- **Link Performance to Mission**

Drawing the Line
What is Success?

- Success
  - The Warrior Ethos (being a warrior)
  - Continued / valued service based on selflessness
- Every person in the Army must be able to draw a line to Soldiers in combat.
- How does the OER support the main effort and not become a peacetime personnel management tool?
  - Leaders have a responsibility to identify <u>their</u> best to the Army's selection process. This ensures the <u>Army's</u> best are selected to lead/train Soldiers in demanding and challenging assignments.
  - Leaders have a responsibility to develop subordinates, Counseling is Key to the evaluation process

Bottom Line Up Front

- COM Report is not a Killer (COM report vs COM File)
- Counseling is the Key (DSF & SPT Form)
- Enhancements for CPT, LT, CW2, WO1 effective 1 Oct 04
  - Expand use of Developmental Support Form to cover all officers in these ranks
  - No Part VIIb Senior Rater Box Check for officers in these ranks

OER SUPPORT FORM - DA FORM 67-9-1

ADDED

PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION

MANDATORY RATER / RATED OFFICER INITIAL FACE-TO FACE COUNSELING ON DUTIES, RESPONSIBILITIES AND PERFORMANCE OBJECTIVES FOR THE CURRENT RATING PERIOD TOOK PLACE ON _____ (Date) Rated Officer Initials _____ Rater Initials _____ Senior Rater Initials _____ (Review)

PERIODIC RATER / RATED OFFICER FOLLOW-UP FACE-TO-FACE COUNSELINGS:

Dates _____ Rated Officer Initials _____ Rater Initials _____ Senior Rater Initials _____

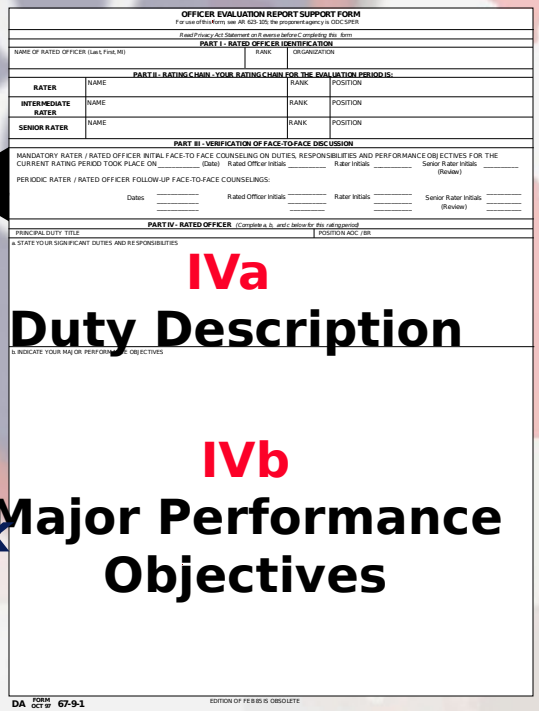
NEW

SUPPORTS:

Objective Setting

Counseling

Rated Officer Feedback



OFFICER EVALUATION REPORT SUPPORT FORM

For use of this form, see AR 623-105; the proponent agency is DDC/SPER

Read Privacy Act Statement on Reverse before Completing this form

PART I - RATED OFFICER IDENTIFICATION

NAME OF RATED OFFICER (Last, First, MI) | RANK | ORGANIZATION

PART II - RATING CHAIN - YOUR RATING CHAIN FOR THE EVALUATION PERIOD IS:

	NAME	RANK	POSITION
RATER			
INTERMEDIATE RATER			
SENIOR RATER			

PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION

MANDATORY RATER / RATED OFFICER INITIAL FACE-TO FACE COUNSELING ON DUTIES, RESPONSIBILITIES AND PERFORMANCE OBJECTIVES FOR THE CURRENT RATING PERIOD TOOK PLACE ON _____ (Date) Rated Officer Initials _____ Rater Initials _____ Senior Rater Initials _____ (Review)

PERIODIC RATER / RATED OFFICER FOLLOW-UP FACE-TO-FACE COUNSELINGS:

Dates _____ Rated Officer Initials _____ Rater Initials _____ Senior Rater Initials _____ (Review)

PART IV - RATED OFFICER (Complete a, b, and c below for this rating period)

PRINCIPAL DUTY TITLE | POSITION ADC / BR

a. STATE YOUR SIGNIFICANT DUTIES AND RESPONSIBILITIES

IVa

Duty Description

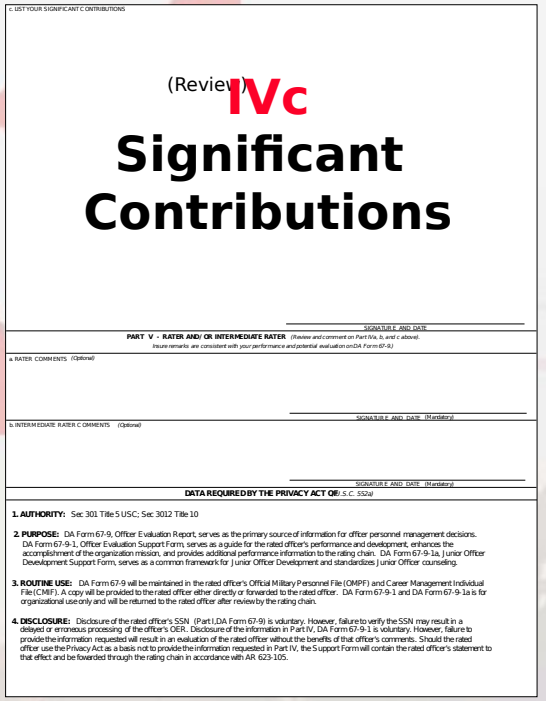
b. INDICATE YOUR MAJOR PERFORMANCE OBJECTIVES

IVb

Major Performance Objectives

DA FORM OCT 97 67-9-1 EDITION OF FEB 85 IS OBSOLETE

(FRONT)



c. LIST YOUR SIGNIFICANT CONTRIBUTIONS

(Review)

IVc

Significant Contributions

SIGNATURE AND DATE

PART V - RATER AND/OR INTERMEDIATE RATER (Review and comment on Part IVa, b, and c above). Insure remarks are consistent with your performance and potential evaluation on DA Form 67-9.

a. RATER COMMENTS (Optional)

SIGNATURE AND DATE (Mandatory)

b. INTERMEDIATE RATER COMMENTS (Optional)

SIGNATURE AND DATE (Mandatory)

DATA REQUIRED BY THE PRIVACY ACT OF 1974 (5 U.S.C. 552a)

1. **AUTHORITY:** Sec 301 Title 5 USC; Sec 3012 Title 10

2. **PURPOSE:** DA Form 67-9, Officer Evaluation Report, serves as the primary source of information for officer personnel management decisions. DA Form 67-9-1, Officer Evaluation Support Form, serves as a guide for the rated officer's performance and development, enhances the accomplishment of the organization mission, and provides additional performance information to the rating chain. DA Form 67-9-1a, Junior Officer Development Support Form, serves as a common framework for Junior Officer Development and standardizes Junior Officer counseling.

3. **ROUTINE USE:** DA Form 67-9 will be maintained in the rated officer's Official Military Personnel File (OMPF) and Career Management Individual File (CMIF). A copy will be provided to the rated officer either directly or forwarded to the rated officer. DA Form 67-9-1 and DA Form 67-9-1a is for organizational use only and will be returned to the rated officer after review by the rating chain.

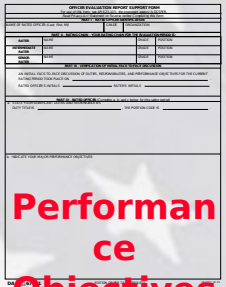
4. **DISCLOSURE:** Disclosure of the rated officer's SSN (Part I,DA Form 67-9) is voluntary. However, failure to verify the SSN may result in a delayed or erroneous processing of the officer's OER. Disclosure of the information in Part IV, DA Form 67-9-1 is voluntary. However, failure to provide the information requested will result in an evaluation of the rated officer without the benefits of that officer's comments. Should the rated officer use the Privacy Act as a basis not to provide the information requested in Part IV, the Support Form will contain the rated officer's statement to that effect and be forwarded through the rating chain in accordance with AR 623-105.

(REVERSE)

DEVELOPMENTAL SUPPORT FORM (DSF)

Enhancements to include CPT & CW2 Effective 1 Oct 04

CW3-CW5/MAJ-BG:



Performance Objectives

SPT FORM

MISSION REQUIREMENTS and MISSION TASKS

- DEVELOPMENTAL TASKS (DSF)
  - * BASED ON MISSION LAID OUT IN SUPPORT FORM
  - * FOCUSED ON LEADERSHIP DOCTRINE
- MANDATORY COUNSELING BY RATERS OF OFFICERS IN RANKS OF: CPT, LT, CW2, WO1
- SR RATER APPROVAL/OVERWATCH

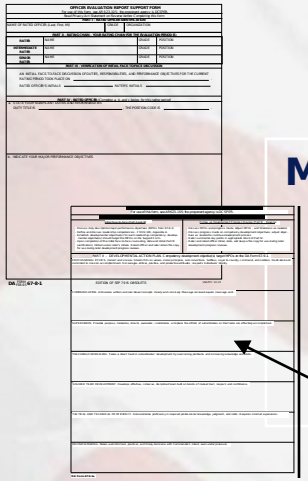
EXAMPLES:

Company Cdr DSF on Platoon Leaders
- BN Cdr over watch

Battalion Cdr DSF on Company Cdrs
- BDE Cdr over watch

CPT/LT/CW2/W01s:

SPT FORM



MISSION REQUIREMENTS (Objectives)

AND

DEVELOPMENTAL TASKS

WORKSHEET

INTEGRATES Development with Performance

As of: 23 August 2004 / POC: CW2 Julie Reyes EAPC (72

DEVELOPMENTAL SUPPORT FORM (DSF)- FRONT SIDE: PARTS I & 2

PART I. INSTRUCTIONS

INITIAL COUNSELING	*FOLLOW-UP COUNSELINGS*

PART II. CHARACTER- LEADER VALUES, ATTRIBUTES, SKILLS

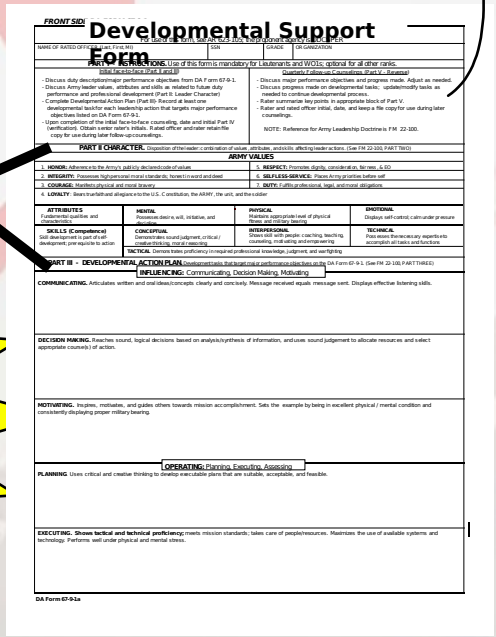
PART II CHARACTER. Disposition of the leader; combination of values, attributes, and skills affecting leader actions. (See FM 22-100, PART TWO)

1. **HONOR:** Identifies with public code of Army values (honor)	5. **RESPECT:** Promotes dignity, consideration, fairness, & EO
2. **INTEGRITY:** Possesses sound moral values; honest in word and deed	6. **SELFLESS-SERVICE:** Places Army priorities before self
3. **COURAGE:** Manifests physical and moral bravery	7. **DUTY:** Fulfills professional, legal, and moral obligations
4. **LOYALTY:** Bears true faith and allegiance to the U.S. Constitution, the ARMY, the unit, and the soldier	

ATTRIBUTES Fundamental qualities and characteristics	**MENTAL** Possesses desire, will, initiative, and discipline	**PHYSICAL** Maintains appropriate level of physical fitness and military bearing	**EMOTIONAL** Displays self-control; calm under pressure
SKILLS (Competence) Skill development is self-development; prerequisite to action	**CONCEPTUAL** Demonstrates sound judgment, critical / creative thinking, moral reasoning	**INTERPERSONAL** Shows skill with people: coaching, teaching, counseling, motivating and empowering	**TECHNICAL** Possesses the necessary expertise to accomplish all tasks and functions
	TACTICAL Demonstrates proficiency in required professional knowledge, judgment, and warfighting		

DISCUSS

LEADER CHARACTER
Rater expectations
Rated officer input
Relate to duties



DEVELOPMENTAL SUPPORT FORM (DSF)- PART III

PART III. DEVELOPMENTAL ACTION PLAN

PART III - DEVELOPMENTAL ACTION PLAN Development tasks that target major performance objectives on the DA Form 67-9-1 (See FM 22-100, PART THREE)

INFLUENCING: Communicating, Decision Making, Motivating

COMMUNICATING: Communicates written and oral ideas/concepts clearly and concisely. Message received equals message sent. Displays effective listening skills.

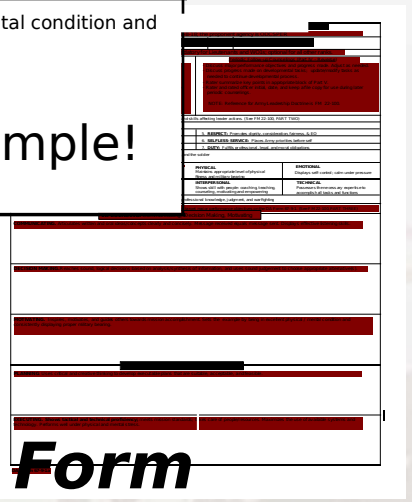
(1) Provide an oral OPORD brief to CO/XO during FTX in April.

DECISION MAKING: Makes sound, logical decisions based on analysis/synthesis of information, and uses sound judgment to choose appropriate alternative(s).

(7) Facilitate a discussion on the ethical decision making during June OPD.

MOTIVATING: Inspires, motivates, and guides others towards mission accomplishment. Sets the example by being in excellent physical / mental condition and consistently displaying proper military bearing.

(3,6) Lead Platoon PT every Monday in April- set the example!



arget performance objectives on Support Form
t least <u>one developmental task per leader action</u>
asks should be specific, measurable, and achievable

DEVELOPMENTAL SUPPORT FORM (DSF)- PARTS IV AND V

PART IV. VERIFICATION

PART IV - VERIFICATION: Rater initials _____ Rated officer initials _____ Date _____ **senior rater initials** _____

PART V. DEVELOPMENTAL ASSESSMENT

PART V - DEVELOPMENTAL ASSESSMENT RECORD: Summary of key points made during follow-up counselings. Highlight progress and strengths observed as well as developmental needs across values, attributes, skills, and actions.

1st Assessment Key Points

participative

candid

NOT A RATING!!

constructive

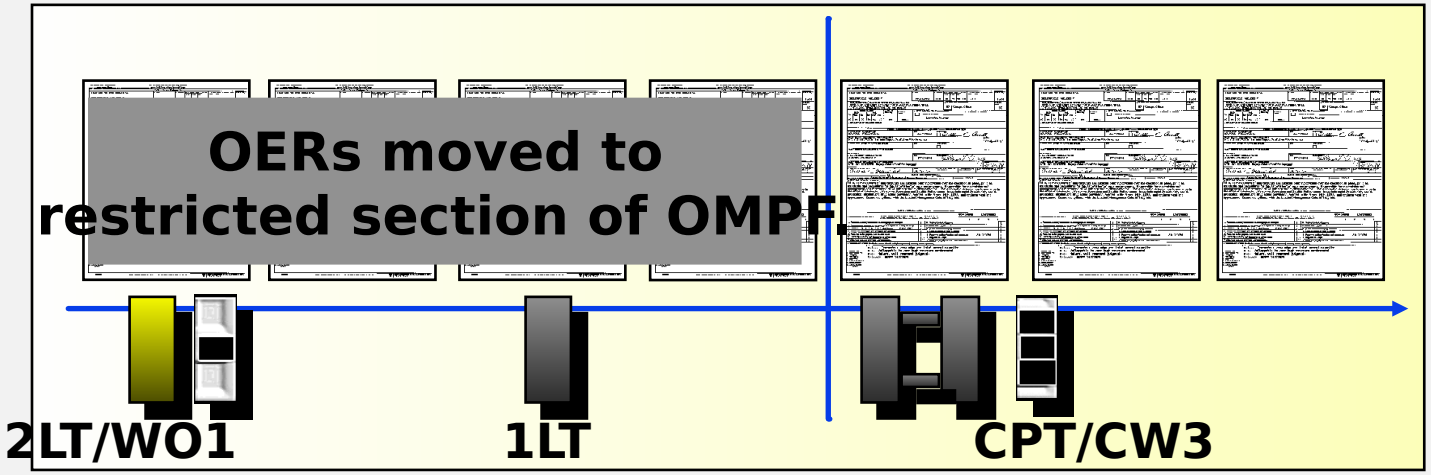
positive

Rated officer initials _____ Rater initials _____ Date _____

Summary of key points

-- discussion of values, attributes, skills
-- progress on developmental tasks and focus
-- noted strengths
-- further needs for focus/improvement
-- rater/rated officer initials and date of counseling

Masking Early OERs



- **WO1 reports "masked" after selection to C**
- **LT reports masked after promotion to CPT**
  - Initial Requirement - YG 87 and later (e.g. YG 88
  - Ongoing Requirement - Upon promotion to CPT
  - ORB lists duty positions even when OERs are "masked"
  - **When you see a BQ (command) or key staff job on ORB with no OER on file; OER was a LT report and therefore "masked"**

Remember all LT OERs are seen by CPT Board.

OER System Enhancements

Purpose:

To implement and support leader development for company grade officers and warrant officers in ranks of WO1 and CW2

OER System Enhancements

Specifics:

- **DA Form 67-9-1a expanded to cover officers in the ranks of CPT, 1LT, 2LT, CW2, and WO1**
- **No block check in part VIIb, SR Box Check, expanded to include CPT, 1LT, 2LT, CW2, and WO1**
- **Focus on quantifiable performance and potential in SR narrative**

OER System Enhancements

Transition:

1. Effective 1 October 2004, raters will initiate the DA Form 67-9-1a for CPT, 1LT, 2LT, CW2, and WO1 within the first 30 days of implementation, if it is not already in use.

2. For officers in these grades Senior Raters will use the part VIIb box check on OERs with THRU dates including 30 September 2004. Senior Raters will not complete the part VIIb box check on OERs with THRU dates of 1 October 2004 or greater. HQDA will process these reports with an HQDA label stating "Not Evaluated."

3. Rating officials will execute a Human Resources Command directed OER (Code 19) with a THRU date of 31 Dec 04 on all CPT, 1LT, 2LT, CW2, and WO1, provided rater meets minimum time qualifications and rated officer has not received a due course OER with a thru date between 1 Oct and 31 Dec 04. Rated officers in attendance at a resident course of instruction or hospital in-patients will

OER System Enhancements

Why:

This enhancement supports the critical tasks of mentoring, educating, and developing future leaders and Warriors for today's Joint and Expeditionary Army

TYPES OF EVALUATION

AR 623-105, Chapter 3

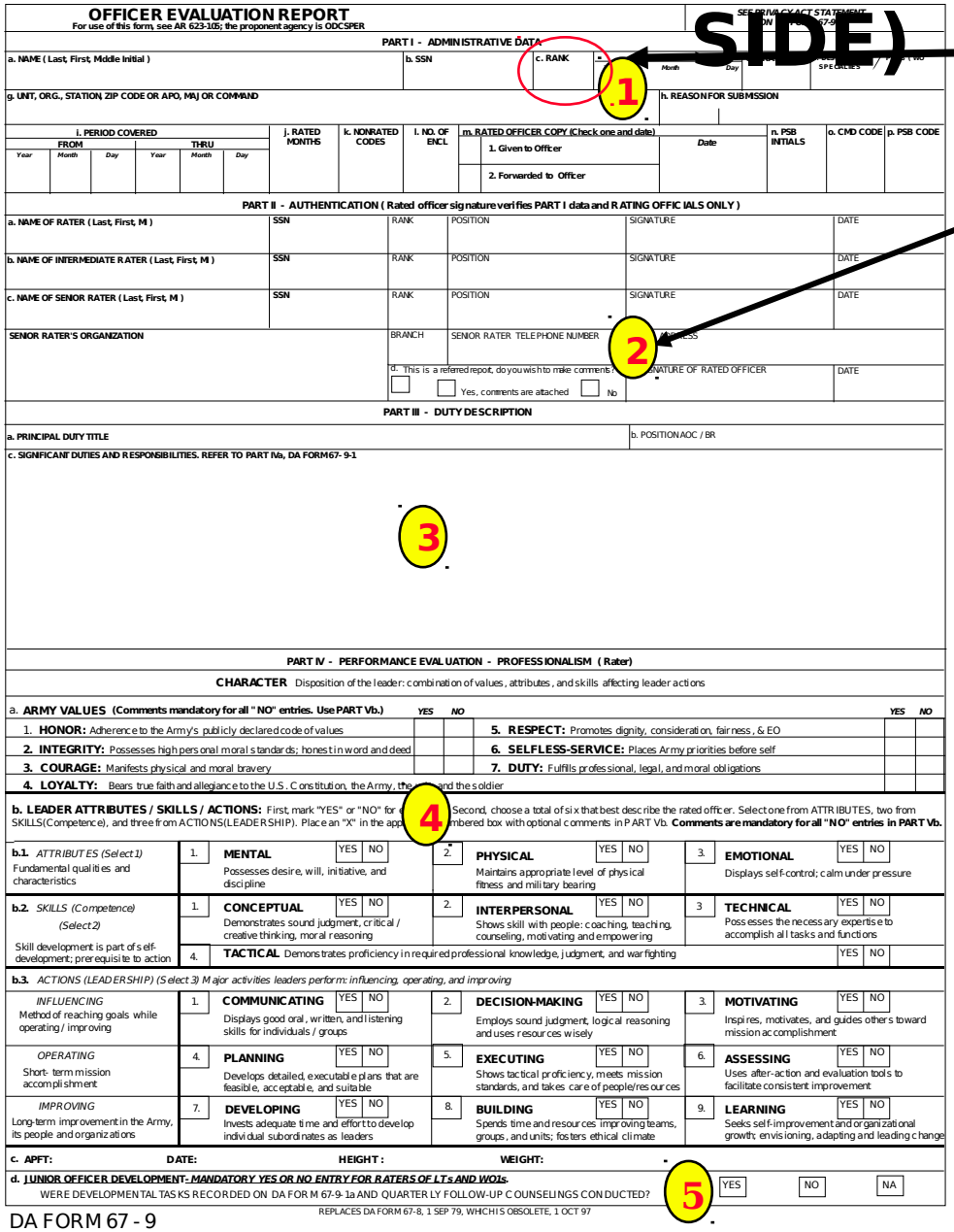
Sec. VII: Mandatory Reports – 90 day minimum

Sec. VIII: Mandatory Reports – Other than 90 day minimum

Sec. IX: Optional Reports

- **CHANGE OF DUTY**
- **CHANGE OF RATER**
- **ANNUAL**
- **COMPLETE THE RECORD**
- **RELIEF FOR CAUSE**
- **OTHER – SPECIAL SITUATIONS**

DA FORM 67-9 (FRONT SIDE)



OFFICER EVALUATION REPORT
For use of this form, see AR 623-105; the proponent agency is ODCSPER

SEE PRIVACY ACT STATEMENT ON DA FORM 67-9

PART I - ADMINISTRATIVE DATA

a. NAME (Last, First, Middle Initial) | b. SSN | c. RANK | d. DATE RANK (Month, Day, Year) | e. PMOS / SPECIALTY | f. DUTY MOS

g. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND | h. REASON FOR SUBMISSION

i. PERIOD COVERED FROM (Year, Month, Day)	THRU (Year, Month, Day)	j. RATED MONTHS	k. NONRATED CODES	l. NO. OF ENCL	m. RATED OFFICER COPY (Check one and date)	Date	n. PSB INITIALS	o. CMD CODE	p. PSB CODE
					1. Given to Officer				
					2. Forwarded to Officer				

PART II - AUTHENTICATION (Rated officer signature verifies PART I data and RATING OFFICIALS ONLY)

	SSN	RANK	POSITION	SIGNATURE	DATE
a. NAME OF RATER (Last, First, MI)					
b. NAME OF INTERMEDIATE RATER (Last, First, MI)					
c. NAME OF SENIOR RATER (Last, First, MI)					

SENIOR RATER'S ORGANIZATION | BRANCH | SENIOR RATER TELEPHONE NUMBER | E-MAIL ADDRESS

d. This is a referred report, do you wish to make comments? ☐ Yes, comments are attached ☐ No | SIGNATURE OF RATED OFFICER | DATE

PART III - DUTY DESCRIPTION

a. PRINCIPAL DUTY TITLE | b. POSITION AOC / BR

c. SIGNIFICANT DUTIES AND RESPONSIBILITIES. REFER TO PART IVa, DA FORM 67-9-1

PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM (Rater)

CHARACTER Disposition of the leader: combination of values, attributes, and skills affecting leader actions

a. ARMY VALUES (Comments mandatory for all "NO" entries. Use PART Vb.)	YES	NO		YES	NO
1. **HONOR:** Adherence to the Army's publicly declared code of values			5. **RESPECT:** Promotes dignity, consideration, fairness, & EO		
2. **INTEGRITY:** Possesses high personal moral standards; honest in word and deed			6. **SELFLESS-SERVICE:** Places Army priorities before self		
3. **COURAGE:** Manifests physical and moral bravery			7. **DUTY:** Fulfills professional, legal, and moral obligations		
4. **LOYALTY:** Bears true faith and allegiance to the U.S. Constitution, the Army, the [illegible] and the soldier					

b. LEADER ATTRIBUTES / SKILLS / ACTIONS: First, mark "YES" or "NO" for [illegible]. Second, choose a total of six that best describe the rated officer. Select one from ATTRIBUTES, two from SKILLS(Competence), and three from ACTIONS(LEADERSHIP). Place an "X" in the appropriate numbered box with optional comments in PART Vb. **Comments are mandatory for all "NO" entries in PART Vb.**

b.1. *ATTRIBUTES (Select1)* Fundamental qualities and characteristics	1.	**MENTAL** Possesses desire, will, initiative, and discipline	YES NO	2.	**PHYSICAL** Maintains appropriate level of physical fitness and military bearing	YES NO	3.	**EMOTIONAL** Displays self-control; calm under pressure	YES NO
b.2. *SKILLS (Competence) (Select2)* Skill development is part of self-development; prerequisite to action	1.	**CONCEPTUAL** Demonstrates sound judgment, critical / creative thinking, moral reasoning	YES NO	2.	**INTERPERSONAL** Shows skill with people: coaching, teaching, counseling, motivating and empowering	YES NO	3	**TECHNICAL** Possesses the necessary expertise to accomplish all tasks and functions	YES NO
	4.	**TACTICAL** Demonstrates proficiency in required professional knowledge, judgment, and warfighting							YES NO
b.3. *ACTIONS (LEADERSHIP) (Select 3) Major activities leaders perform: influencing, operating, and improving*									
INFLUENCING Method of reaching goals while operating / improving	1.	**COMMUNICATING** Displays good oral, written, and listening skills for individuals / groups	YES NO	2.	**DECISION-MAKING** Employs sound judgment, logical reasoning and uses resources wisely	YES NO	3.	**MOTIVATING** Inspires, motivates, and guides others toward mission accomplishment	YES NO
OPERATING Short- term mission accomplishment	4.	**PLANNING** Develops detailed, executable plans that are feasible, acceptable, and suitable	YES NO	5.	**EXECUTING** Shows tactical proficiency, meets mission standards, and takes care of people/resources	YES NO	6.	**ASSESSING** Uses after-action and evaluation tools to facilitate consistent improvement	YES NO
IMPROVING Long-term improvement in the Army, its people and organizations	7.	**DEVELOPING** Invests adequate time and effort to develop individual subordinates as leaders	YES NO	8.	**BUILDING** Spends time and resources improving teams, groups, and units; fosters ethical climate	YES NO	9.	**LEARNING** Seeks self-improvement and organizational growth; envisioning, adapting and leading change	YES NO

c. APFT: DATE: HEIGHT: WEIGHT:

d. **JUNIOR OFFICER DEVELOPMENT-** ***MANDATORY YES OR NO ENTRY FOR RATERS OF LTs AND WO1s.***
WERE DEVELOPMENTAL TASKS RECORDED ON DA FORM 67-9-1a AND QUARTERLY FOLLOW-UP COUNSELINGS CONDUCTED? ☐ YES ☐ NO ☐ NA

DA FORM 67 - 9 REPLACES DA FORM 67-8, 1 SEP 79, WHICH IS OBSOLETE, 1 OCT 97

1. Be careful with "P" indicato
(AR 623-105, para 2-8)

2. RO signs last, ***Allow for Time*** SR uses AKO address when possible.

3. Lists Scope & degree of responsibility in terms of: resources, people, facilities & budget.

4. No is Bad
Leader Word Picture - ***No "School Solution"***

Important to CFD Board

5. ***New!*** Effective 1 Oct 04 For Evaluation of Raters

As

DA FORM 67-9 (REVERSE

NAME | SSN | PERIOD COVERED

PART V - PERFORMANCE AND POTENTIAL EVALUATION (Rater)

a. EVALUATE THE RATED OFFICER'S PERFORMANCE DURING THE RATING PERIOD AND HIS/HER POTENTIAL FOR PROMOTION

6

☐ OUTSTANDING PERFORMANCE, MUST PROMOTE ☐ SATISFACTORY PERFORMANCE, PROMOTE ☐ UNSATISFACTORY PERFORMANCE, DO NOT PROMOTE ☐ OTHER *(Explain)*

b. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE AND POTENTIAL FOR PROMOTION. REFER TO PART III, DA FORM 67-9 AND PART IVa, b, AND c DA FORM 67-9-1.

7

c. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

8

PART VI - INTERMEDIATE RATER

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

☐ BEST QUALIFIED ☐ FULLY QUALIFIED ☐ DO NOT PROMOTE ☐ OTHER *(Explain below)*

I currently senior rate_____officer(s) in this grade

A completed DAForm67-9-1 was received with this report and considered in my evaluation and review ☐ YES ☐ NO *(Explain in c)*

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (UNLESS OTHERWISE PRINTED BY DA)

9

☐ ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)

☐ CENTER OF MASS

☐ BELOW CENTER OF MASS RETAIN

☐ BELOW CENTER OF MASS DO NOT RETAIN

c. COMMENT ON PERFORMANCE / POTENTIAL

10

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

6. **To Date Most RO's viewed as *Outstanding***

7. **Performance & Potential**

Authorized: Double space between Performance & Potential comments (MSG 02-220)

8. **NOT for Potential - Optional: *Unique Professional Skills/Expertise_***
Mandatory: For ACC CPT thru LTC - must recommend a Career Field (CF/BR or CF/FA)

9. **No Part VII b Box Check For Evaluations on MG/CPTs/LTs & CW5/CW2s/WO1s (effective 1 Oct 04)**

10. **Quantifiable Performance & Potential Comments in narrative**

PROFESSIONALISM - PART IV

PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM (Rater)

CHARACTER Disposition of the leader: combination of values, attributes, and skills affecting leader actions

a. **ARMY VALUES** (Comments mandatory for all "NO" entries. Use PART Vb.)	YES	NO		YES	NO
1. **HONOR:** Adherence to the Army's publicly declared code of values			**5. RESPECT:** Promotes dignity, consideration, fairness, & EO		
2. INTEGRITY: Possesses high personal moral standards; honest in word and deed			**6. SELFLESS-SERVICE:** Places Army priorities before self		
3. COURAGE: Manifests physical and moral bravery			**7. DUTY:** Fulfills professional, legal, and moral obligations		
4. LOYALTY: Bears true faith and allegiance to the U.S. Constitution, the Army, the unit, and the soldier					

b. LEADER ATTRIBUTES / SKILLS / ACTIONS: First, mark "YES" or "NO" for each block. Second, choose a total of six that best describe the rated officer. Select one from ATTRIBUTES, two from SKILLS(Competence), and three from ACTIONS(LEADERSHIP). Place an "X" in the appropriate numbered box with optional comments in PART Vb. **Comments are mandatory for all "NO" entries in PART Vb.**

b.1. *ATTRIBUTES (Select 1)* Fundamental qualities and characteristics	1.	**MENTAL** Possesses desire, will, initiative, and discipline	YES NO	2.	**PHYSICAL** Maintains appropriate level of physical fitness and military bearing	YES NO	3.	**EMOTIONAL** Displays self-control; calm under pressure	YES NO
b.2. *SKILLS (Competence)* *(Select 2)* Skill development is part of self-development; prerequisite to action	1.	**CONCEPTUAL** Demonstrates sound judgment, critical / creative thinking, moral reasoning	YES NO	2.	**INTERPERSONAL** Shows skill with people: coaching, teaching, counseling, motivating and empowering	YES NO	3	**TECHNICAL** Possesses the necessary expertise to accomplish all tasks and functions	YES NO
	4.	**TACTICAL** Demonstrates proficiency in required professional knowledge, judgment, and warfighting	YES NO						
b.3. *ACTIONS (LEADERSHIP) (Select 3) Major activities leaders perform: influencing, operating, and improving*									
INFLUENCING Method of reaching goals while operating / improving	1.	**COMMUNICATING** Displays good oral, written, and listening skills for individuals / groups	YES NO	2.	**DECISION-MAKING** Employs sound judgment, logical reasoning and uses resources wisely	YES NO	3.	**MOTIVATING** Inspires, motivates, and guides others toward mission accomplishment	YES NO
OPERATING Short- term mission accomplishment	4.	**PLANNING** Develops detailed, executable plans that are feasible, acceptable, and suitable	YES NO	5.	**EXECUTING** Shows tactical proficiency, meets mission standards, and takes care of people/resources	YES NO	6.	**ASSESSING** Uses after-action and evaluation tools to facilitate consistent improvement	YES NO
IMPROVING Long-term improvement in the Army, its people and organizations	7.	**DEVELOPING** Invests adequate time and effort to develop individual subordinates as leaders	YES NO	8.	**BUILDING** Spends time and resources improving teams, groups, and units; fosters ethical climate	YES NO	9.	**LEARNING** Seeks self-improvement and organizational growth; envisioning, adapting and leading change	YES NO

APFT:c. **DATE:** **HEIGHT :** **WEIGHT:**

dUU

IVd. Mandatory Yes or No Box Check for Raters of CPT, LT, CW2 and WO1 (effective 1 Oct 0

t IVd ***1 Oct***

REPLACES DA FORM 67-8, 1 SEP 79, WHICH IS OBSOLETE, 1 OCT 97

RATER AND INTERMEDIATE RATER EVALUATIONS - PART V & VI

Va

NAME | SSN | PERIOD COVERED

PART V - PERFORMANCE AND POTENTIAL EVALUATION (Rater)

a. EVALUATE THE RATED OFFICER'S PERFORMANCE DURING THE RATING PERIOD AND HIS/HER POTENTIAL FOR PROMOTION

☐ OUTSTANDING PERFORMANCE, MUST PROMOTE ☐ SATISFACTORY PERFORMANCE, PROMOTE ☐ UNSATISFACTORY PERFORMANCE, DO NOT PROMOTE ☐ OTHER *(Explain)*

b. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE AND POTENTIAL FOR PROMOTION. REFER TO PART III, DA FORM 67-9 AND PART III a, b, AND c DA FORM 67-9-1.

Vb - RATER NARRATIVE:

Performance and Potential

(can be separated by double space)

MILPER MSG 02-220

c. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Part Vc

Two Parts

Optional -*Unique Professional Skills/Expertise*

(Effective 1 JAN 99)

Mandatory - must recommend a career field (CF/Br or CF/FA)

DA FORM 67-9-1, JAN 99 PART VI, INTERMEDIATE RATER

PART VI - INTERMEDIATE RATER NARRATIVE

SENIOR RATER'S PORTION - PART VII

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

☐ BEST QUALIFIED ☐ FULLY QUALIFIED ☐ DO NOT PROMOTE ☐ OTHER *(Explain below)*

I currently senior rate_____officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review ☐ YES ☐ NO (Explain in c)

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

☐ ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)

☐ CENTER OF MASS

☐ BELOW CENTER OF MASS RETAIN

☐ BELOW CENTER OF MASS DO NOT RETAIN

c. COMMENT ON PERFORMANCE / POTENTIAL

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Officers Not Receiving Part VIIb Box Check

Effective 1 Oct 04

Example of Senior Rater Comments

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

[X] BEST QUALIFIED [ ] FULLY QUALIFIED [ ] DO NOT PROMOTE [ ] OTHER *(Explain below)*

I currently senior rate 16 officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review [X] YES [ ] NO *(Explain in C)*

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

- [ ] ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)
- [ ] CENTER OF MASS
- [ ] BELOW CENTER OF MASS RETAIN
- [ ] BELOW CENTER OF MASS DO NOT RETAIN

c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL

CPT Buck is the best out of 16 Captains I senior rate. I personally selected him from a group of carefully screened candidates to command a world class, highly elite OPFOR rifle company. A consummate officer, CPT Buck leads by example, is soundly grounded on tactics and shares his soldiers sacrifices and challenges. Must select this combined arms warrior for below the zone to Major and early to CGSC-ILE.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Battalion S-3, Battalion Executive Officer, Battalion Commander Would Serve Army Best in OPCF/11

Senior Rater Unit Level

After HQDA Processing

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

[X] BEST QUALIFIED [ ] FULLY QUALIFIED [ ] DO NOT PROMOTE [ ] OTHER *(Explain below)*

I currently senior rate 16 officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review [X] YES [ ] NO *(Explain in C)*

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

Not Evaluated

R: CPT BUCK, GEORGE 999999999

SR: COL SMITH 666666666

DATE: 04 08 18

c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL

CPT Buck is the best out of 16 Captains I senior rate. I personally selected him from a group of carefully screened candidates to command a world class, highly elite OPFOR rifle company. A consummate officer, CPT Buck leads by example, is soundly grounded on tactics and shares his soldiers sacrifices and challenges. Must select this combined arms warrior for below the zone to Major and send early to CGSC-ILE.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Battalion S3, Battalion Executive Officer, Battalion Commander Would Serve Army Best in OPCF/11

OER Processing Issues

- **Part II - Invalid Rater/Senior Rater**
  *** When CPTs get promoted to MAJ minimum grade for SR Changes**
- **Part II - Referred OER not referred**
- **Part IIc. - Incorrect SSN & branch for Senior Rater**
- **Part IVb. - Block checks missing**
- **Part IVd. - HT/WT Yes/No missing**
- **Part IVd. - DSF evaluation incorrectly annotated (New for CPT & CW2s, effective 1 Oct 04)**
- **Part Vb. - No potential comments (mandatory)**
- **Part Vc. - Potential comments in this block should only be for unique skills**
  - No recommended Career Field

OER Issues Con't

- **Part Vc. – Career Fields for <u>Special</u> Branches (not required)**
- **Part VIIa. – Number of "currently senior rated officers" incorrect/blank**
- **Part VIIb. - No Part VIIb box check for MG/CPT/LT & CW5/CW2/WO1s (expansion effective 1 Oct 04)**
- **Part VIId. – Missing recommended Career Field/Future Assignments**
- **Required Enclosures missing with OER**

Officer Evaluations Via Email

- **Option for AC reports on officers deployed in support of contingency operations and/or Korea.**
- **Not limited to PSBs; S1s may request authorization for submission at BDE/BN level.**
- **Users must have high-quality scanners or digital senders for double-sided documents.**
- **To become an authorized user, submit request to tapcmser@hoffman.army.mil.**

POC List

509th PSB:	
Battalion Commander:	**730-6633**
Chief Milpo Ops:	**730-4760**
A Det Commander:	**730-4133**
B Det Commander:	**732-5112**
B Det Chief:	**732-4795**
516th PSB:	
Battalion Commander:	**724-6705**
A Det Commander:	**724-6194**
A Det Chief:	**723-5558**
B Det Commander:	**753-8075**
B Det Chief:	**753-7598**
C Det Commander:	**768-7910**
C Det Chief:	**768-6957**
Chief of PERMAST:	**724-6718**